

# Stage Lighting Market - Global Outlook and Forecast 2020-2025

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## Abstracts

The global stage lighting market is expected to grow at a CAGR of over 4% during the period 2019–2025.

The following factors are likely to contribute to the growth of the global stage lighting market during the forecast period:

Expansion of Live Performance and Music Industry

Increasing Number of Exhibitions, Conferences, and Seminars

Growing Demand for Technically Advanced Products

Increasing Adoption in Smart Wireless Lighting Control

Increasing Number of Sporting Events

The stage lighting market is expected to witness rapid growth on account of the continuous increase in demand for live entertainment across the world. Strong demand for stage illumination fixtures and control solutions and the increased end-users' spending sentiments on music concerts and festivals worldwide are driving the market growth. Further, the increase in corporate sponsorship for music tours, venues, and events is contributing to growth.

With the increase in consumer spending sentiments since 2008?2009 economic recession and 2011?2012 Eurozone debt crisis, the prospect of the stage lighting

market worldwide has improved. The rise of the global music industry and the increased number of live performances and concerts have boosted the demand for stage illumination. The demand for stage illumination fixtures and control solutions from countries such as China, Germany, Japan, and India has also grown due to the flourishing commercial real estate, hospitality, corporate, and music markets. However, a relatively high cost of LEDs and low penetration of wireless digital technology remain the primary growth inhibitors in APAC countries such as China, India, and Latin America.

The study considers the present scenario of the global stage lighting market and its market dynamics for the period 2019-2025. It covers a detailed overview of several market growth enablers, restraints, and trends. The study offers both the demand and supply aspects of the market. It profiles and examines leading companies and other prominent companies operating in the market.

### Stage Lighting Market: Segmentation

This research report includes detailed segmentation by product, end-user, fixture, application, and geography. Parabolic aluminized reflectors (PARs) are the most widely used fixtures in the entertainment industry and generated over \$440 million in 2019. The increasing emphasis on cost efficiency is driving stage illumination fixtures in the market. However, LED PARs are likely to witness high application in concerts and stage and lighting shows. The growing proliferation of LED PAR fixtures is expected to increase both in new installation as well as retrofit projects. Moreover, the use of LED strip lights is increasing at worship places, museums, and art exhibitions. Cyc lights are an improvement over strip lights and are used to enlighten large surfaces as these devices are designed to wash a large curtain, scenery, or cyclorama evenly. The increased number of roadshow performances and art auction, and exhibitions and a high focus on backstage visualization are expected to contribute to the growth of strip/Cyc lighting across the globe.

The increasing number of live performances, music concerts, festivals, and growth in the number of music shows are expected to influence the growth of the segment. Latin America, which witnessed a low growth for concerts, is expected to emerge as the fastest-growing concert market in the world on account of growing partnerships between global concert organizers and local ones.

Growth prospects in the fixed installation segment is expected to be promising owing to the growth in commercial constructions and the increasing adoption of fixed lightings at

worship places, gaming arenas, luxury hotels, gambling venues, stadiums, convention, and trade show centers during the forecast period.

Static lights are easy to use and offer constant illumination. They are extensively used in exhibition halls, tradeshow, convention centers, and theaters. These fixtures are also likely to find their usage in the touring rental segment. The demand for automated fixtures is likely to increase in schools and community theaters as they are becoming more cost-effective and easier to program. Automated/intelligent fixtures offer innovative features such as bright light with flexibility and can be remotely operated.

The conventional lighting segment is expected to witness steady growth as they are inexpensive. The market demand for conventional equipment is likely to increase in developing countries such as China, Brazil, and India. The demand for LED stage lighting is expected to increase at a faster rate. The increased proliferation of LED devices is likely to fuel the growth of the market worldwide. These light sources offer longer lifespan, require no maintenance, and produce less heat. LED modules are also cost-effective.

As music festivals with live performances are attracting global tourists, the trend is expected to increase in emerging countries such as Asia and Africa. The rise of virtual reality and augmented reality is likely to influence live music performances. The population in France, Germany, the UK, the US, and Japan is expected to attend more music concerts than pubs and clubs. The increase in corporate events is also likely to influence the growth of stage lighting products. North America is leading the corporate event market. Moreover, the rise in the wedding industry is expected to grow the demand for innovative lighting technologies. Decor and themes are influenced mainly by the Indian film industry. This is expected to make the destination wedding a major trend. Hence, changing wedding trends is likely to increase the demand for stage lightings, thereby driving growth.

## Market Segmentation by Products

Lighting Fixture

PARs

Striplights/borderlights and cyc lights

Ellipsoidals

Fresnels

Follow spots

Beam projectors

Scoops

Lighting Control

Lighting controllers

Visualizers

Market Segmentation by End-user

Touring Rental

Fixed installation

Market Segmentation by Lighting Fixture

Based on Fixture Movement

Static lighting fixtures

Automated/intelligent lighting fixtures

Based on Lighting Source

Conventional lighting

LED lighting

Market Segmentation by Application

Concerts/Touring

Corporate Events

Weddings/Event

House of Worship

DJ Retail/Rec DJ

Fitness Sports

Theatres

Architectural and Commercial Installs

Broadcast/TV/Film

Hospitality

Nightclubs/Bars

## **Insights by Geography**

The penetration of stage lighting fixtures is expected to remain an all-time high in North America during the forecast period because of the increased replacement and upgrading of legacy systems in the region. The rise in tradeshows, the growth of the music industry, the increasing growth of the US economy, coupled with improved corporate profits and a surge in domestic travel, are expected to propel the growth. The EU regulations on energy-efficiency on conventional light sources are likely to generate demand for new installation as well as upgrades. Europe is known as the leading destination for music festivals; therefore, these festivals generate the demand for stage lighting systems among event organizers. The festivals and concerts segment is expected to be contributed over \$475 million to the market. The APAC region is expected to be driven by the recovery in the Japanese music market and the emergence of the Chinese media and film industries. Urbanization and increase in the APAC population are also likely to bolster the growth of entertainment, broadcasting, hospitality, exhibition, music concerts, and restaurant industries.

## Market Segmentation by Geography

North America

US

Canada

APAC

Japan

China

South Korea

Australia

Europe

UK

Germany

France

Spain

Nordic

Italy

MEA

UAE

South Africa

Saudi Arabia

Latin America

Brazil

Mexico

## Insights by Vendors

The global stage lighting market is expected to be highly fragmented with several local and global players in the market. The competition is intense. The rapidly changing technological environment is likely to drive vendors to alter and refine their unique value proposition to achieve a strong presence. The market concentration in developed countries is expected to be high.

In contrast, the market in developing economies such as China and India is at a nascent stage because of the entry of key global brands. Vendors compete in terms of product offerings and pricing. Vendors are also expected to use new business models and focus on developing portfolios to drive growth. The focus is likely to shift toward LED stage lighting fixtures as they are energy efficient and are likely to replace conventional fixtures. The competition is expected to intensify further with an increase in product extensions, technological innovations, and mergers and acquisitions. Key global players are expected to expand their presence worldwide during the forecast period, especially in APAC and Latin America regions, which are fast-growing ones.

### Key Vendors

HARMAN International

Osram

Philips

### Other Vendors

Absen America

Altman Lighting

Antari

Apollo Design Technology

Ayrton

Blizzard Lighting

Chauvet Professional

Chroma-Q

City Theatrical

Core Lighting

Dexel

Eaton Electrical Systems

Elektralite

Elation Professional

ENTTEC

Epsilon Professional Lighting

Electronic Theatre Controls

German Light Products

Golden Sea Professional Equipment Ltd

Kumho Electric



Leprecon

Litetrronics International

Lycian Stage Lighting

MA Lighting Technology

Mighty Bright

MLS

Nicolaudie

0energyLIGHTING

Pathway Connectivity

PROEL

Red Lighting

Rosco

SGM Light A/S

Studio Due

Techni-Lux

Teclumen

Ultra-Tech Lighting

Ushio Lighting

Zumtobel Group

## Key Market Insights

The analysis of the global stage lighting market provides sizing and growth opportunities for the forecast period 2020–2025.

Provides comprehensive insights on the latest industry trends, forecast, and growth drivers in the market.

Includes a detailed analysis of growth drivers, challenges, and investment opportunities.

Delivers a complete overview of segments and the regional outlook of the global market.

Offers an exhaustive summary of the vendor landscape, competitive analysis, and key strategies to gain a competitive advantage.

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